Procedures for Purchasing Products & Services
from Information Builders, Inc (IBI)
via the
DBM-0215-IBI Contract
&
Master Software License Agreement

A) PURPOSE

These procedures establish a uniform process for purchasing products and services via the DBM-0215-IBI contract. These procedures provide information on:
- ♦ How to request information from IBI;
- ♦ How to verify prices;
- ♦ How to prepare and submit Purchase Orders.

B) APPLICATIONS

The following categories of products & services are available under this contract:
- a) Micro-Products – IBI products that are designed for personal computers or network workstations including Power FMIS Reporting Packs.
- b) One Time License – A 99-year software license for which the Licensee pays a lump sum fee.
- c) Rental License – The right to use IBI software and receive software maintenance upon payment of an annual or monthly fee.
- d) Software Maintenance – Technical support, software fixes and regularly scheduled software upgrades in accordance with the InfoResponse Silver Agreement.

C) PROCEDURES

1) Price quotes may be requested only for those products and services included on the contract. For example, only those products that are listed in the current IBI Product Fee Schedule may be purchased via this contract.

2) Prices must be verified for each product or service. Pricing for products in this contract is stated either as a fixed price in the current fee schedule, or as a percentage of the current list price. Agencies must obtain a copy of the applicable pricing information from IBI and maintain a copy in the agency's procurement file.

3) The following information must be provided to CPMD:
- a) A copy of the price quote received from IBI;
- b) A copy of the applicable product fee schedule.

4) All agencies that purchase any products or services via this contract, regardless of whether the agency processes a PO through APICS, must follow these procedures.

5) **Purchase Order (PO) Process**

   a) Agencies that process a PO via the statewide ADPICS may use any document and document type combination. In such cases, the DBM-0215-IBI Blanket Purchase Order (BPO) #050B2800118 and commodity codes are mandatory data elements. Therefore, in addition to the BPO #, each PO must include:

      (i) One or more of the following commodity codes:
         20558-IBILIC   Software License
         92045-IBIMAN   Software Maintenance

      (ii) The following coding on the additional element screen:
         PROCUREMENT METHOD: R
         CATEGORY OF WORK: R
         AWARD AUTHORITY: BPW
         MBE WAIVER: N
         DESC: Refer to DBM BPO

   b) DBM's Office of Information Technology/Contracts & Project Management Division (CPMD) must review and approve all requests before the PO is approved and issued to IBI. CPMD will review requests as quickly as possible, generally within three (3) working days:

      (i) If approved, CPMD will notify the agency that the PO may be issued.
      (ii) If additional information is needed, CPMD will contact the agency and review the new material promptly, generally within one (1) working day.
      (iii) If it appears that the PO may not be approved, CPMD will contact the agency in order to resolve any issues.
      (iv) If the issues cannot be resolved, CPMD will disapprove the PO and notify the agency with the specific reason(s). In such a case:
         (a) The agency's Chief Information Officer (CIO) may appeal the decision to the State CIO.
         (b) Appeals must be submitted in writing within thirty (30) calendar days after the disapproval from CPMD.

D) CONTRACT MANAGER

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